



**STATE OF MONTANA  
MONTANA DEPARTMENT OF TRANSPORTATION  
JOB PROFILE**

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Update

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Formal Review

**Date Submitted**

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***SECTION I - Identification***

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**Working Title: Financial Specialist**

**Department: Transportation**

**Job Code Number: 132915**

**Division & Bureau: Engineering  
Right of Way Bureau**

**Job Code Title: Financial Specialist**

**Section & Unit: Right of Way Bureau**

**Pay Band: 5**

**Work Address: 2701 Prospect Avenue  
PO Box 201001  
Helena, MT 59620-1001**

**Position Number: 60032**

**Phone: 444-6060**

☐

FLSA Exempt

☒

FLSA Non-Exempt

☐

Non-Union

☐

MPEA

☐

Blue Collar

**Profile Completed By: Rob Stapley**

**Work Phone: 444-6063**

***Work Unit Mission Statement or Functional Description:***

The Montana Department of Transportation's mission is to serve the public by providing a transportation system and services that emphasize quality, safety, cost effectiveness, economic vitality and sensitivity to the environment.

The Engineering Division prepares projects for bidding and coordinates highway construction. The Division is made up of the Materials, Construction Administration Services, Construction Engineering Services, Contract Plans, Right of Way, Bridge, Traffic and Safety, Consultant Design, and Highways bureaus; the Engineering Information section; and five District Construction Offices in Missoula, Butte, Great Falls, Glendive, and Billings for budget and workforce purposes.

The Right of Way Bureau (ROW) acquires land for transportation projects and administrative needs. It also provides assistance and payments to individuals and businesses relocated by highways; designs the right of way; and arranges for utilities relocation that conflict with highway construction.

**Describe the Job's Overall Purpose:**

This position serves as a Financial Specialist for the Right of Way Bureau and is responsible for analyzing right of way project documentation, developing total and individual cost projections, and coordination with Legal, Fiscal Programming, and management staff to establish funding strategies. The position also provides quality assurances for right of way funding requests, authorizations, and related documentation; monitors the status of projects to accommodate funding deviations and overruns; and manages program databases to ensure accurate and complete project records and reporting. The position reports to the Right of Way Bureau Chief.

**SECTION II - Major Duties or Responsibilities**

*This section should be a clear concise statement of the position's major duties and the approximate percent of work time for each duty*

**% of Time**

**A. FISCAL PLANNING AND BUDGET MANAGEMENT**

**50%**

1. Coordinates and oversees fiscal planning and project monitoring systems and procedures for the Right of Way Bureau to ensure the accuracy, compliance, and efficiency of project cost data. This involves evaluating project needs, State and federal regulations and requirements, and other factors to determine appropriate processes, priorities, and technical resources for ensuring the quality and utility of fiscal operations for various right of way projects.
2. Researches, compiles, and analyzes right of way documentation to calculate preliminary acquisition costs and submit program funding requests. This involves compiling, analyzing and evaluating data from multiple sources, including OPX2, PPMS, and DMS related to costs of acquisition, project administration, and relocation assistance; project/location maps and data; environmental issues; appraisal fees; MDT staff time; Indirect Cost rates (IDC); and other variables to determine projected total costs of right of way projects. Ensures the reasonableness of cost projections through research and analysis of historical data, scenario analysis to determine the likelihood and extent of ancillary costs (e.g., probability and scope of appraisals, legal fees, documentation, etc.).
3. Submits formal funding requests to Fiscal Programming staff; explains and clarifies specific project issues; and presents justifications as to the amounts, locations, projected costs, and other aspects of funding requests as necessary. Conducts quality assurance reviews of preliminary project data to verify projected costs, location data, and compliance with Department and FHWA procedures and requirements. Programs PPMS cost estimates to reflect actual values. Tracks the status of requests to research and respond to questions and concerns related to various project proposals.
4. Fulfills program modification requests by initiating an audit by the Acquisition Section to confirm project completion, finalizes closeout of project programming once 100% of parcels are closed and project is let, reviews PE files in Helena and from the Districts, Oracle programs, BV report and CARES to determine the outstanding costs and figure dollar adjustment amount necessary to complete project. Prepares final voucher and closing memo for Design Section Supervisor to sign and routes to Accounting to close the 9202 account.
5. Develops funding strategies that maximize available State and federal resources while meeting specific project requirements (e.g., split or phased acquisitions may involve multiple funding alternatives, advantages, and restrictions). This involves assessment of construction sequences, costs of overall projects and individual phases, environmental concerns, and other issues. Recommends final funding strategies to the Bureau Chief for acceptance or revision.

6. Conducts final quality assurance reviews of authorized funding requests to verify the integrity of data contained in authorizations, design plans, and federal aid documentation. This includes verification of right of way identification codes, designations, approval dates, and other information through examination of environmental and legal documentation, design sheets, federal funding guidelines, and other sources. Coordinates with legal and fiscal staff, designers, and/or supervisors to explain, investigate, and resolve discrepancies.
7. Monitors and evaluates condemnation proceedings to incorporate projected cost modifications into fiscal plans for various projects. Coordinates with legal staff to evaluate the status of litigation and potential cost implications (e.g., court fees, settlements, documentation, appeals, etc.) in order to develop and incorporate reasonable projections into modified costs. Develops and assesses various scenarios, evaluates potential implications, and determines the most likely impacts to cost projections.
8. Researches and analyzes project overrun reports to determine causes (e.g., settlements in excess of projected amounts, condemnation proceedings, relocations, design changes, etc.) and develop justifications; tracks the fiscal status of open projects to anticipate overruns and develop project modifications. Coordinates with the Bureau Chief, Legal Section staff, and District Right of Way Supervisors as necessary to resolve problems and submits modification requests to Fiscal Programming staff and updates Oracle and PPMS to reflect current values.
9. Develop and enter projections into Fiscal Programming – monthly or as needed. Assist Design Section Supervisor in determining which projects need to be programmed during the federal fiscal year. Provide funding projections to Design Section Supervisor. Complete report and send to Fiscal Programming, Preconstruction Engineer, Bureau Chief, Design Section Supervisor, and permanent file.
10. Prepares all budget projections for the Bureau quarterly, with monthly tracking projections. If changes are directed, make adjustments and distribute the information to the Engineering Fiscal Officer.
11. Represents the Bureau's fiscal planning interests and activities in Department management, strategic planning, fiscal analysis, and other meetings to explain and justify Bureau positions on various issues; develop fiscal processes and procedures; and analyze and resolve problems affecting fiscal operations.

**B. DATA MANAGEMENT**

**20%**

1. Enters new projects into Oracle's Project Parcel Tracking System. Manages, maintains, and updates existing projects in the Project Parcel Tracking System database to ensure the accuracy of information as well as effective system operations. Loads system updates, resolves routine technical problems, and coordinates with EIS and other information systems specialists to resolve system-wide problems. Support District and Helena Personnel with these duties.
2. Develops data tracking and reporting systems to monitor project status, search and merge data, and compile statistical reports. Responds to requests for project data by researching and compiling relevant data and statistics and clarifying information.
3. Provides quality control reviews of data maintained by Design staff to ensure the accuracy of data and efficiency of processing. Check blue sheets and authorization sheets from Helena and District Design to ensure they have correct dates, sheet numbering, project number, etc. If and error is found notify the Designer so a supplemental request or correction can be done. Provides technical assistance in resolving more complex aspects of system operations and data processing as necessary.

4. Requests title commitments from various companies throughout the state for use in processing right of way plans and condemnations. Selects qualified title companies and services based on historical performance, cost, technical considerations, and other factors. Monitors status of title requests, processes claims and payments, and responds to questions from Department staff and company representatives.
5. Researches and compiles right of way plans, reports, and other documentation for Department staff, FHWA personnel, city/county governments, consultants, and other parties to assist in completion of respective planning or design work. This includes researching Federal Aid Road Log, right-of-way plans and documentation, legal descriptions, construction plans, and other sources to provide necessary information.
6. Coordinates compilation and transmittal of right of way plans, route descriptions, and other documentation to appropriate County Clerk and Recorder Offices to ensure compliance with State statutes. Receives and tracks plan receipts from the County Clerk and Recorders for potential condemnation through Legal. Effective transmittal involves significant legal implications in finalizing deeds and ensuring the continuation and completion of major projects.
7. Reviews, verifies, and records data from right of way projects into program databases. This includes project numbers, ownership information, type of right of way involvement, and other pertinent information. The position typically establishes data maintenance priorities and oversees the work of subordinate staff to provide quality assurance and technical assistance.
8. Provides specialized training, troubleshooting, and technical assistance to Department staff and consultants on the functions and operations of automated data systems. Provides ongoing technical assistance to Bureau staff, and presents small-group training sessions as requested.

**C. STAFF SUPERVISION**

**20%**

1. Directly supervises staff by reviewing and revising overall subordinate work plans, priorities, and procedures, and monitoring progress through meetings and consultations. Conducts staff meetings, disseminates data, and promote information exchange for support and advancement of MDT goals.
2. Determines training needs of staff through analysis of new technology, policies, and staff performance. Prepares, presents, or arranges training through personnel specialists, training offices, or outside consultants to ensure modern technology and the latest methods are used. Ensures consistency in the application of training opportunities for all staff.
3. Identifies staffing needs and works with the Bureau Chief to recruit and hire employees. This involves ensuring compliance with state and federal employment and civil rights law throughout the hiring process, assigning personnel screening and selection committees, reviewing results and making final recommendations for hiring, and ensuring proper training and orientation of new employees.
4. Evaluates the performance of all positions directly supervised and completes performance evaluations. Implements and monitors corrective actions including discipline and termination. Enforces disciplinary policies to ensure consistency in application of disciplinary action.
5. Ensures that staff complies with state and departmental personnel rules, regulations, and policies and collective bargaining agreements. Resolve grievances at the lowest level whenever possible.

**E. OTHER DUTIES**

**10%**

1. This position provides a variety of other research, data management, and funding support services as assigned by the Bureau Chief in support of the Department's mission and Bureau objectives. This includes representing the Bureau at conferences and meetings, coordinating special projects, and attending ongoing education and training as directed.
2. Develops agency documentation letters to ensure consistency and accuracy of information provided by agency personnel. This involves determining data required for proper documentation in accordance with federal requirements, creating templates incorporating all necessary information fields, and ensuring that essential field documentation forms are complete and readily available to Department personnel.
3. Research or assists consultants and Department personnel in doing research for existing right of way plans and deed information.

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1. ***The following duties and/or specific tasks listed under section II above are considered "essential functions" because they require specialized expertise and skill and are the primary reasons the job exists (they must be performed by this position with or without accommodations):***

Duty A: Fiscal Planning and Budget Management

Duty B: Data/Management

Duty C: Supervision

***The following mental and physical demands are associated with these essential functions:***

**PHYSICAL**

- Light lifting (less than 10 lbs.)
- Carrying light items (papers, books, small parts)
- Remaining seated for extended periods of time, with occasional walking; standing; bending
- Consistent use of keyboard
- Operating a personal computer
- Communicate in writing, in person, and over the phone

**MENTAL**

- Ability to multi-task
- Demands for accuracy in all aspects of work
- Ability to meet inflexible deadlines
- Computing arithmetic operations
- Comparing data
- Compiling information
- Analyzing
- Coordinating
- Synthesizing
- Instructing

2. Does this position supervise others? ☒ Yes ☐ No

Number directly supervised: 3

Position Number(s) of those supervised: 60035, 60015, 39005

3. Attach an Organizational Chart.

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**SECTION III - Minimum Qualifications - List minimum requirements for the first day of work.**

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**Critical knowledge and skills required for this position:**

**KNOWLEDGE:**

The position requires advanced knowledge of the principles and practices of contract administration; federal and state contract requirements; financial analysis of road/bridge construction and related construction activities; mathematics and their applications; budgeting; construction project management and inspection; and statistical analysis. This position requires knowledge of the principles and practices of fiscal planning, project funding, and accounting; land title records and procedures; and statistics. The position also requires knowledge of data management; database operations, including Oracle and Access-based systems; and standard system troubleshooting techniques. This position requires working knowledge of applicable laws, rules and regulations; project planning; project budgeting; accounting and Generally Accepted Accounting Principles (GAAP); federal funding requirements; data and records management; and public procurement.

**SKILLS:**

This position requires skill in evaluating construction plans, cost estimates, project specifications, and project requirements; monitoring contract performance; responding to clients inquiries and/or providing training as appropriate; directing and overseeing the preparation of various financial, technical, and related project reports; and conducting statewide audit reviews of all projects; directing, organizing, and coordinating multiple projects related to payment and contract compliance; project management skills; budget monitoring and analysis; accounts reconciliation; and effective written and verbal communication skills.

**Behaviors required to perform these duties:**

See MDT Core Behaviors

**Education:**

Check the one box indicating minimum education requirements for this position for a new employee the first day of work:

- |                                                               |                                                                          |
|---------------------------------------------------------------|--------------------------------------------------------------------------|
| <input type="checkbox"/> No education required                | <input type="checkbox"/> Related AAS/2-years college/vocational training |
| <input type="checkbox"/> High school diploma or equivalent    | <input checked="" type="checkbox"/> Related Bachelor's Degree            |
| <input type="checkbox"/> 1-year related college/voc. training | <input type="checkbox"/> Related Master's degree                         |

**Please specify the acceptable fields of study:**

*Acceptable:* Accounting, Finance, Business Management, or related field

**Other education, training, certification, or licensing required (specify):**

**Experience:**

Check the one box indicating minimum work-related experience requirements for this position for a new employee the first day of work:

- |                                                       |                                          |
|-------------------------------------------------------|------------------------------------------|
| <input type="checkbox"/> No prior experience required | <input type="checkbox"/> 3 years         |
| <input type="checkbox"/> 1 year                       | <input type="checkbox"/> 4 years         |
| <input checked="" type="checkbox"/> 2 years           | <input type="checkbox"/> 5 or more years |

**Other specific experience (optional):**

Experience must also include one (1) year of supervisory experience.

**Alternative Qualifications:**

This agency will accept alternative methods of obtaining necessary qualifications.

- ☒ Yes ☐ No

**Alternative qualifications include:**

Equivalent combination of education and experience will be considered on a case by case basis.

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***SECTION IV – Other Important Job Information***

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- |                                            |                                                 |
|--------------------------------------------|-------------------------------------------------|
| <input type="checkbox"/> Fingerprint check | <input type="checkbox"/> Valid driver's license |
| <input type="checkbox"/> Background check  | <input type="checkbox"/> Other; Describe        |

Other information including working conditions such as shifts, lifting requirements, travel or hours.

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**SECTION V – Signatures**

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Signature indicates this statement is accurate and complete.

***Employee:***

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

***Immediate Supervisor:***

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

***Bureau Chief:***

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

***Division/District Administrator:***

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

***Department Designee:***

Brent Rabe/Designee

Chief Human Resources Officer  
Human Resources Division

Signature: \_\_\_\_\_ Date: \_\_\_\_\_